



Filing ID #10021187

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Courtney Tritch
Status: Congressional Candidate
State/District: IN03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/4/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual TOD ⇒ American Funds Income Fund of America F [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Carter Validus MC 1 [RE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Carter Validus MC 2 [RE]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$1 - \$200
Individual TOD ⇒ FS Investment Corp 2 [HE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Hines Global REIT [RE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Hines Global REIT 2 [RE]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1 - \$200
Individual TOD ⇒ MFS International Diversification i [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual TOD ⇒ putnam global industrials -y [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Individual TOD ⇒ regional bank-i [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Individual TOD ⇒ SunAmerica Brokerage Money Market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
JP Morgan Chase Personal [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ American Funds 2045 Target Date-A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Funds Capital Income Builder C [MF]		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Capital Income Builder F [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Funds Growth Fund of America C [MF]		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Growth Fund of America F [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Funds Investment Company of America C [MF]		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Investment Company of America F [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation B [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation C [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ American Funds Capital Income Builder F [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ American Funds Growth Fund of America F [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ American Funds Income Fund of America F [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Archer-Daniels-Midland Company (ADM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Assurant, Inc. (AIZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Broadcom Corporation - Class A (BRCM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Dodge & Cox International Stock [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Facebook, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Fiserv, Inc. (FISV) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Johnson Controls International plc Ordinary Share (JCI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Masco Corporation (MAS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ MFS Diversified Income Fund I [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ MFS International Diversification A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Nike, Inc. (NKE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ NVIDIA Corporation (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ ONEOK Partners, L.P. (OKS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Ryder System, Inc. (R) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Sierra Income Corp [HE]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ SunAmerica Brokerage Money Market [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ SunAmerica Specialty Income Explorer W [MF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA ⇒ Sysco Corporation (SYY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Target Corporation (TGT) [ST]		\$1,001 - \$15,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
self employed	consulting fee	N/A	\$1,450.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner/Sole Proprietor	Courtney Tritch Consulting

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Individual TOD
LOCATION: US
- Roth IRA
- Traditional IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Courtney Tritch , 05/4/2018